

Client Data Sheet Trusts

Accounting for You Limited



Trust name
Date Trust Commenced

IRD Number
Name of Payroll Software

GST Registered Yes
No

Frequency 1 2 6

	Settlor One	Settlor Two	Settlor Three
Name			
IRD Number			
	Trustee One	Trustee Two	Trustee Three
Name			
IRD Number			
Address			
Address Line 2			
Email			
Date of Birth			
Permanent Resident of NZ Y / N			
If no what country are you a permanent resident of			
	Beneficiary One	Beneficiary Two	Beneficiary Three
Name			
IRD Number			
Address			
Address Line 2			
Email			
Date of Birth			

AML Requirements - Please bring with you

Passport or NZ Drivers Licence

Proof of Address (Dated less than 6 months ago)

GENERAL

Do you have an current accountant Y / N

If (yes) Accountant Name

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Do you currently use xero Y / N

Subscription name/s

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How did you hear about us

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